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ABSTRACT

This document describes the public relations strategies employed by the Lakewood (Ohio) City School district to obtain voter support for a school levy. Various aspects of this successful campaign are described, including the formation of administrative committees to oversee campaign activities, steering and citizens' committees, the use of publicity, the development of an operating calendar, and finances associated with the campaign. (RAO)

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HOW TO RUN A SUCCESSFUL

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HOW TO RUN A SUCCESSFUL SCHOOL LEVY CAMPAIGN: A CASE STUDY OF INFORMATION DISSEMINATION TECHNIQUES USED IN THE LAKEWOOD (OHIO) CITY SCHOOLS 1978 OPERATING LEVY CAMPAIGN

Introduction

You don't have to be a Madison Avenue executive filled with mass media hype to run a successful school levy campaign. Common sense, a little organizational ability and application of the basic principles of communication will serve quite well, even under the most adverse of circumstances. This is what we learned coordinating our school operating levy campaign last fall.

Disaster from the Start

That's not the way it started out, though. Our board of education had been discussing the schools' financial needs for over a year. These had been duly reported in the media. For nearly the same length of time we had been reading everything in sight on school levies. A thoughtful analysis of the various voting publics in our community had been completed, although never committed to paper. When the board made its decision, we felt reasonably well prepared to begin.

Then disaster struck. Proposition 13 reared its ugly head throughout the land. The major metropolitan area adjacent to ours was slapped with a court busing order. As a final blow, our teaching staff went out on a 12-day strike--the first in the community's history.

By the time the strike was settled, election day was about a month away. Communications were in a shambles, and morale was at an all-time low. The community's pride had been deeply hurt. When we met about the levy the morning after the strike, there was only weariness and doubt in the superintendent's voice as he looked up and asked, "What levy?"

Administrative Committee

We did not indulge ourselves in this mood for long, however. The superintendent appointed an administrative committee of three administrators, a board member and himself. We were all soon off and running.

The first administrator went to work on a calendar. He also developed a theme, poster and buttons for the campaign. Then he took off on a previously scheduled and much deserved vacation of a lifetime to China. We wished him well and forged right ahead.

The second administrator was charged with special events and door-to-door distribution. He also served as our liaison with city hall and performed much of the leg work necessary for our endeavor. Although the two of us had not known one another very well before, we had developed a close working relationship manning the command post during the strike. The

two of us were to maintain our 12- to 20-hour day pace for another month while other administrators stood by supportively wondering when we were going to crash. We never did.

I was the third administrator. Although I have been in public education for nearly a quarter of a century, my experience in levy campaigns was a few hours of telephoning about ten years ago. My assignments were to handle the mass media and to operate the telephone survey. I also served as general coordinator and kept the campaign moving along on schedule.

The board member was instrumental in recruiting and scheduling volunteer workers for the telephone survey and door-to-door distribution. She is one of those beautiful people who have a special sense of timing. Whenever we were beginning to feel desperate, she appeared with her very willing hands and a head full of good advice.

The superintendent was our leader and chief consultant. He served as the major spokesperson for the campaign. Like a good leader, he delegated the authority and responsibility for running the campaign to the rest of us, then let us do our job, monitoring progress only at occasional intervals.

The administrative committee was the backbone of the campaign. We communicated daily, but met only once during the whole month we worked together.

Citizens' Committee

A citizens' committee, co-chaired by a man and a woman, was appointed by the board as the official levy committee. A local banker, who had served in the same capacity during previous school issues, was appointed treasurer. Other members of the citizens' committee were two seniors (a man and a woman), a former levy chairman, a businessman, a clergyman, two teachers (a man and a woman), two students (a boy and a girl), a real estate saleswoman, a public relations man, a parent, and an experienced political party worker.

The committee had many good ideas. It was originally intended that its members should develop the theme and take a more prominent role in the planning and conducting of the campaign. The strike cut the time for their participation precariously short, so a steering committee was formed to take up the slack. The citizens' committee met weekly during the course of the campaign, usually on Sunday afternoons after the football games.

Steering Committee

The steering committee was comprised of the administrative committee and the citizens' committee chairpersons. It met weekly during the course of the campaign, planning, making decisions and solving problems. This committee usually met over box lunches at mid week and sometimes before the citizens' committee meetings.

Theme

Our theme was nearly perfect for the times, "Lakewood Schools, 1879-1979--Hard Earned, Worth Keeping." It helped restore the public's confidence in the schools by capitalizing on 100 years of educational progress in the community. It was the kind of theme to which each person might bring his or her own memories and interpretations. The theme was used on our posters, buttons, bumper stickers, slide-tape presentation, advertisements, newsletter and brochure.

Calendar

A three-month calendar was developed listing all the public events in the community from the opening of school to election day. This calendar was added to and revised throughout the campaign. After the strike, it was abbreviated to a little over three weeks. Our board room quickly underwent the transformation from strike command post to election headquarters. The calendar was developed with a page for each day. It was attached to the wall, each day following the last in orderly progression all around the room, so that all the days were visible from any place in the room. In addition to all the key events, the names of persons with responsibilities for working the events were also posted. The calendar was invaluable in tracking down who had the slide-tape presentation in the trunk of his or her car, who was going to sell buttons at the next meeting, and so forth.

Finance

Letters were sent by the committee treasurer for contributions to the campaign fund. A list from past years was used after it had been brought up to date using the yellow pages, the school directory, PTA membership lists, and other simple devices. Several community leaders volunteered to revise the list. The PTA Council assesses each building unit a certain amount each year so that the campaign fund always has a solid base. This gave us a very nice treasury. A budget of a little over $3000 was planned.

Kickoff

The campaign was kicked off at a luncheon with community leaders and key communicators jointly sponsored by the board of education and the chamber of commerce about three weeks before election day. A slide-tape report of the preceding school year was presented. The superintendent reviewed the financial status and the achievements of the schools, and the board president asked the business community for its support. About 100 persons attended.

Slide-Tape Presentation

The slide-tape presentation was divided into four parts: (1) Introduction; (2) Yesterday (historical pictures and facts); (3) Today (pictures and facts about current programs with emphasis on both excellence and the basics); and

(4) Tomorrow (lots and lots of pictures of Lakewood kids in rapid succession). The presentation was about ten minutes long. There was no effort to boost the levy, except to conclude the narrative with "Lakewood Schools--Hard Earned, Worth Keeping." The slide-tape presentation was used by the superintendent and other speakers with about 30 community organizations during the next three weeks of the campaign. Some nights there would be as many as three different showings to three different groups.

Volunteers

A special letter was sent to staff members by the board member asking for volunteers to work in the campaign. A special issue of the superintendent's newsletter also reminded staff members how to support the levy. Three additional reminders were placed in the three weekly staff newsletters prior to the election. The PTA Council president, the board members and teacher representatives on the citizens' committee personally solicited volunteers. The personal solicitation of workers was definitely more successful than written solicitation. The whole effort would have been more efficient if we had developed a consolidated schedule of all the workers. The rate of attendance would probably have been higher if we had phoned to remind them of their commitments slightly ahead of time.

Speakers

The superintendent was our major speaker. He was assisted by various board members, depending on the occasion, and by a senior who concentrated on the many senior citizen groups in our community. Talks were given at every public event and every civic organization that we could schedule in the four weeks. Usually the slide-tape presentation was shown, and someone was also on hand to sell campaign buttons. Two transparencies were prepared for use with speeches. One showed our students' performances on standardized tests to demonstrate that Lakewood kids were scoring well above the national norms. The other showed our per pupil costs in comparison to all other school districts in the county. We ranked last.

Posters

Five hundred posters were distributed throughout the community by one of the seniors on the citizens' committee. She was assisted by several high school students who earned credit for their civics classes by working on the campaign. Mostly businesses along main thoroughfares were asked to display the posters. No great effort was made to display them in the windows of private homes. This was an economy measure as well as the deliberate targeting on voters who shopped in the community. Even so, several enthusiastic citizens decorated their cars and homes with the posters. Additional posters might have been used by poll workers on election day had they seemed necessary.

Buttons

There were 1500 buttons purchased at $.23 and sold for $.25 each. The purpose of the button was not so much to make money nor to communicate messages about the campaign. Rather it was to get as many persons as possible to make a commitment to the campaign, modest though that stake might be. It was an easy and inexpensive way of giving people the feeling that they were participating in and supporting the levy. This effort just about broke even. The buttons were most popular in the intermediate and middle school grades. There were several complaints that the pins damaged clothing.

Bumper Stickers

One thousand bumper stickers were donated by a radio station as a public service. The station catered to the teen-age audience. The bumper stickers were distributed to staff, to high school and middle school students, and to others who requested them. Here, too, there were complaints. Either the bumper stickers did not adhere, or they left a messy residue. Some questioned the propriety of permitting the radio station to use its call letters on the bumper sticker. (They were in very modest one-inch letters, the same color as the rest of the lettering, in the lower right corner.) The steering committee and the citizens' committee felt the benefits outweighed the criticisms on both the bumper stickers and the buttons.

Publicity

About a dozen ideas for pictures and feature stories were forwarded to the newspapers, commercial television stations and radio stations in rotation during the last two weeks of the campaign. Only one of the ideas was used. A TV station covered a mock election in one of our elementary schools on election day. One of the daily newspapers also reported a series of in-the-street interviews which showed support for the levy on the Thursday before election day.

We have since been advised by one of our reporter friends that it would have been better to release the tips to all the news agencies and let them make the choice of whether or not to use the ideas. We have used this strategy in our regular public relations work since that time with the effect that our television coverage has nearly quadrupled and the coverage in one of the daily newspapers has measurably improved as well.

Fact Sheets

An eight-page question-and-answer fact sheet was developed for the administrative staff and others who requested it. The fact sheet gave detailed information about the levy. Similar compilations of detailed financial data might also have been prepared. These are not for use with the general public. Rather they are for the in-house audience and sophisticated voters who wish more information than may satisfy the regular voter.

Advertisements

A set of nine ads was developed by a group of people working with the public relations man from the citizens' committee. One was a fact ad in question-and-answer format. The ad was prepared after using some formative evaluation techniques with a group of about 30 PTA members. They were presented with the eight-page question-and-answer fact sheet and asked to mark those questions which they thought their friends and neighbors would be most interested in knowing.

This was a departure from previous elections in which it had been the custom to run a full-page newspaper ad to answer a long list of questions. It was reasoned that a quarter-page ad with about ten questions would be sufficient. The rest of the advertising budget could then be better spent by targeting on smaller, more highly defined segments of the voting public, communicating the message a larger number of times with small variations in each presentation.

To this end, seven six-inch, two-column ads were developed portraying typical Lakewood residents--seniors, blue collar workers, working women, businessmen, students, families and new parents. The ads stated in about 25 words why the persons pictured were voting for the levy. Formative evaluation techniques were again used in developing the wording of the ads. This time rather than ask a large group of lay persons to respond, about half a dozen of the best and most sensitive readers and writers on our staff were asked for their advice. These ads were among the most difficult material we have ever had to write. Simplicity, clarity and brevity ruled.

A composite ad using all the pictures and hitting on the main ideas was also used as a quarter-page ad. It said that Lakewood citizens were proud of their schools. The schools make Lakewood a great place to live and to learn. Good schools mean good business and high property values. Keeping our schools strong is a sound investment in the future. All the ads closed with a replica of the ballot, marked "yes," and a repetition of the campaign theme.

The small ads were used in the weekly paper beginning two weeks before the election. Costs prohibited placing them in the daily papers. Radio and television advertising was also prohibitive, and public service time is always difficult to procure around elections. The fact sheet and the composite were used during the second week only. All were used in the community newsletter which was mailed to each resident about a week before the election. The composite and the fact ad were also used in a brochure for door-to-door distribution.

Community Newsletter

The school district regularly publishes a community newsletter every two months. The centerfold of the pre-election issue was comprised of a reproduction of the poster on the first page. The top of the second page picked up the "Hard Earned" portion of the theme and presented two pie charts of 1977 revenues and expenditures. The bottom of this page used the "Worth Keeping" caption, listing several dozen school services

under the headings of "The Basics," "Quality Education," "Pupil Personnel Services," "Vocational Education," "Adult Education," and "School of Practical Nursing." The fact sheet comprised the third page of the brochure. The composite ad made up the back page.

Each school was asked to concentrate on the teaching of the basics and the development of good citizenship (discipline) in its column of the 24-page newsletter. This was in direct response to the Phi Delta Kappa polls on public opinion about education. The election issue of the newsletter also carried articles on the financial status of the schools and the strike settlement under the byline of the superintendent. Other levy-related articles were reports on SAT, ACT and ITBS scores, a brief history of the schools developed by two high school students as an independent study project, and a summary of the efforts made by the schools to inform and involve the community in their work.

Door-to-Door Distribution

Thirty thousand extra copies of the centerfold were distributed door-to-door by a compliment of 260 volunteers beginning Friday after school and continuing through Monday before election day. Brochures were divided into manageable bundles. A card giving the distribution assignment was made for each bundle. Workers returned cards to headquarters as an accountability measure. Some bundles were delivered to volunteer workers via elementary school leaders. Others were picked up by the workers directly. Special commendations go to workers who rose earlier than the break of day in order to distribute in the high rises before the custodial staff could catch up with them.

Telephone Survey

The purpose of the telephone survey was two-fold. First, it created a way of listening to the community's response to the levy. The information could have been used to design special messages for special concerns or for specific areas of the city had the need arisen. Second, it identified our "yes" voters, whom we re-called right before the election and reminded to vote.

Poll books for our 76 precincts were purchased from the board of elections. Multiple copies of city directories were also purchased. Phone numbers were recorded during two evening work sessions--one manned by PTA workers, the other by staff. The staff performed more efficiently and accurately on this job than did PTA volunteers.

About 3000 numbers were dialed at random by volunteers who worked ten phones from 10:00 a.m. to 10:00 p.m. for two weeks before the election. Workers were instructed to ask the question, "If the election were tomorrow, would you vote for the school levy?" after briefly identifying themselves as levy workers. Answers were categorized as "yes," "no," and "undecided." Some voters were scratched from the list because of wrong numbers, moving, absentee ballots, etc.

Volunteers thanked all "yes" voters and told them we would be counting on them on election day. They were instructed to make a note of any objections "no" voters might express, but otherwise to get off the phone as quickly as

possible. They were specifically asked to definitely not try to convince, argue with, or persuade "no" voters. "Undecided" voters were asked to look for our brochures which were delivered to their doors. The strategy was to identify as many "yes" voters and get them to the polls, while avoiding stirring up the "no" voters.

We quickly found that we reached more of the voters at home in the evenings than during the days. The supper hour was the very best time to call, which confirms the research about telephone surveys. However, supper time is very difficult for procuring volunteers.

The phone survey showed a two-to-one margin of support from the very first random sample of ten precincts. Numbers were randomly called from each of the poll books up until the last two days. On these days, "yes" voters were recalled, reminded to vote and again thanked for their support.

Special Events

One of the special events which the committee wished to undertake never got off the ground. It was a 100th birthday party for the schools, complete with parade, birthday cake, children in pioneer costumes, etc. It fell by the wayside when it became impossible to coordinate the band's schedule with the police chief's recommendation for times when main traffic arteries through the city could be closed for such an event.

The other special event is the traditional use of a little red school house in all Lakewood school campaigns. The school house is built on a wagon and pulled by a pick-up truck, usually donated by one of the local car dealers. Each year's committee paints it with a new slogan. An old fire bell is borrowed from the fire department and hung in the bell tower. The school house is driven around the city with bell ringing to remind voters to support their schools.

The school house made its appearance at all public events the last three weeks before elections. It was present at rallies for the gubernatorial and lieutenant gubernatorial candidates. (The latter was a graduate of our high school.) It was also on hand for home football games, spaghetti dinners, and Sunday church services. The last two days of the campaign it traversed the main bus lines in and out of the city during rush hours and swept the city systematically at other times of the day.

Following the buses was a new angle for this campaign based on some research which suggested that support for money issues generally parallels major bus routes in metropolitan areas. Both bus riders and drivers seemed to enjoy this tactic. On election day the school house concentrated on the larger polling places in the city early in the day through supper time.

Letters to the Editors

Letters were sent from the citizens' committee chairpersons, the board and a senior. At least two unsolicited letters also appeared in the papers. All were favorable to the levy.

Endorsements

Endorsements were sought and received from the League of Women Voters and the local weekly newspaper. The YMCA volunteered its endorsement. Time did not permit the solicitation of other endorsements.

Churches

Posters were placed in the churches for the Sunday before the election. The superintendent sent a letter to the clergy asking for support in church bulletins and announcements. One of the questions in the fact ad addressed voters whose children attend non-public schools by saying that sending one's children to private schools does not relieve one of public responsibilities. It also told of over a million dollars of materials processed for parochial schools during the year.

Poll Workers

Efforts to secure volunteer poll workers were abandoned when nasty weather was predicted for election day. Only about two actually worked. By that time the phone survey indicated that there should be no problem.

Post-Election Party

Two additional administrators were asked to assign persons to collect results and tabulate them at a traditional post-election party the evening of the election. The party is a well established custom, win or lose. Everyone is welcome. Several hundred usually appear.

Results

Election day was one of the longest days of our professional lives. However, when the results were tallied, they showed we carried 72 out of the 76 precincts, the largest number ever carried in a school election for which we have records. The margin was 60 percent, down about 5 to 6 percent from the telephone survey. We anticipated it would be down somewhat, but did not dare believe the vote would be quite so favorable. It was the greatest margin in the past 20 years. Before that only the post-World War II issues carried by greater margins.

Thanks

Personalized thank-you letters were sent by the uperintendent to committee members, volunteers and others for their efforts in the campaign. An issue of the newsletter was used to thank the staff. A letter to the editor was sent by the co-chairpersons of the citizens' committee thanking the community for their support. Schools decorated their windows with thank-yous of their own design. The superintendent drew a lot of laughs when he presented his coordinator with a commemorative cigar in appreciation of a levy that was "Hard Earned, Worth Keeping."